

User Manual

Healthcare Professional

Table of Contents

Title	Page
Introduction	3
• Welcome to VAMS	3
• Your Role and Responsibilities	4
• Healthcare Professional User Manual Guidance	5
• Navigating VAMS	6
Section 1 Getting Started in VAMS	7
• Activate Your User Account	8
• View and Manage Scheduled Appointments	9
Section 2 Vaccine Administration	10
• Access the Recipient's Record	11
• Review the Recipient's Record	12
• Log Vaccination	14
Section 3 Vaccine Administration in Third-Party Clinics	19
• Third-Party Clinic Administration	20
• Add Recipients in VAMS (one at a time, bulk upload)	21
• COVID-19 Vaccine Administration	25
Section 4 Additional VAMS Functionality	26
• Register as a COVID-19 Vaccine Recipient	27
• Access Multiple Clinics in VAMS	28
• Access Support	29
Glossary of Terms	30



Introduction

Welcome to VAMS

The Vaccine Administration Management System (VAMS) is a secure, web-based tool built to help jurisdictions, vaccination clinics, organizations/employers, and vaccine recipients manage COVID-19 vaccination efforts. It supports operations and data collection and tracking to meet COVID-19 vaccination requirements.

VAMS Has Four Portals.

Each portal is designed for specific types of users.



Jurisdiction Portal

Jurisdictions can use VAMS to:

- Designate specific organizations/employers that serve critical infrastructure populations (including volunteers) and groups for initial allocation.
- Identify at-risk populations that are a high priority for vaccination.
- Build a database of COVID-19 vaccination clinics in their jurisdiction.
- Access COVID-19 vaccine inventory and administration data for analysis and reporting.



Organization & Employer Portal

Organizations* or employers (referred to as “organizations” in this user manual) of critical infrastructure populations can use VAMS to:

- Add critical infrastructure workers and other at-risk groups to be considered for COVID-19 vaccination.
- Automatically send email notifications to those individuals to register in VAMS and schedule their vaccination appointment(s).



Recipient Portal

Vaccine recipients** can use VAMS to:

- Register as a vaccine recipient.
- Locate a clinic and schedule vaccination appointments.
- Schedule and track follow-up vaccination appointments (if applicable).
- Receive proof of vaccination.



Clinic Portal

Vaccination clinics*** (referred to as “clinics” in this user manual) can use VAMS to:

- Register the clinic.
- Check in recipients.
- Document and track COVID-19 vaccine administration and waste.
- Monitor vaccine inventory levels.

***“Organization” refers to any institution, association, company, or other group that will add critical infrastructure workers and other at-risk groups in VAMS to be considered for COVID-19 vaccination. “Employer” is one example of an organization.*

***To use VAMS, vaccine recipients must have internet access, an email address, and the ability to navigate the system or have someone assist them.*

****Vaccination clinics are often referred to as “vaccine clinics” in VAMS.*



Your Role and Responsibilities

Your role in VAMS is critical to making sure recipient vaccinations are successful.

As a **healthcare professional (HP)**, you will use VAMS to manage the COVID-19 vaccine administration process for recipients. In VAMS, you can cancel recipient appointments, review recipient information, log vaccination, and view dates when recipients can get the second dose of vaccine.

The table below illustrates the activities that only you, as the HP, can perform in VAMS.



Responsibilities	Clinic Healthcare Professional	Clinic Administrator	Clinic Inventory Manager	Clinic Front Desk
Serve as the clinic point of contact for your jurisdiction		✓		
Manage clinic information (e.g., physical address)		✓		
Set and manage clinic schedule		✓		
Manage clinic COVID-19 vaccine inventory		✓	✓	
Manage (add, edit, remove) VAMS users		✓		
Check in vaccine recipients				✓
Create walk-in recipients' appointments				✓
Cancel recipients' appointments	✓			✓
Confirm recipients' identity	✓			✓
Access and review recipients' records (name, date of birth [DOB], medical history, known allergies, etc.); add notes to record (if applicable)	✓			
Log vaccination (vaccine information, outcome, and waste, if applicable)	✓			
View dates when recipients can get their second doses	✓			




Healthcare Professional User Manual Guidance

This user manual is designed for [you](#).

This manual describes your role and responsibilities (referred to as “tasks” or “activities” in this user manual) in VAMS. Detailed instructions on how to perform your tasks are included in each section. This manual also includes an overview of other VAMS user roles and responsibilities to provide context on how you will work with other users in the system.

How to Use this User Manual

Throughout this user manual, you will see the following components.

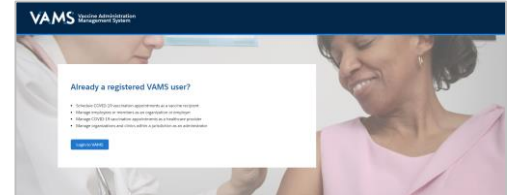
Component	Description
NOTE:	Notes are need-to-know pieces of information you should be aware of.
Quick Tip:	Quick Tips are good-to-know pieces of information and tips for getting the most out of VAMS.
➤ Arrows	Arrows indicate action items (e.g., “Click the button”).
• Bullets	Circular bullets indicate information about steps in a process that don’t require action (e.g., “A pop-up window will appear”).
Bright blue hyperlinks	Bright blue hyperlinks link to external pages (e.g., https://vams.cdc.gov/vaccineportal/s).
Gray hyperlinks	Gray hyperlinks in the footer link to section dividers and to this manual’s table of contents (e.g., “Return to Table of Contents” links in the page footers).
Dark blue hyperlinks	Dark blue hyperlinks link to other pages in this manual (e.g., Step 1: Activate Your Account in VAMS).
	Buttons like the one pictured also link to other pages in this user manual.



Navigating VAMS

Quick Tip: VAMS works best in the Google Chrome browser but can be accessed via any browser except Internet Explorer. VAMS also works on mobile browsers.

To access VAMS once registered, visit the landing page (<https://vams.cdc.gov/vaccineportal/s>) and log in with your user name and password (see [Section 1](#) for how to activate your VAMS account).



The components listed below are in VAMS to help you navigate the system.

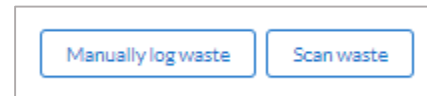
Header/Banner



The **VAMS logo** takes you to your portal's home page. The **Help** link takes you to a list of frequently asked questions (FAQs) that will help you navigate the system. Click the drop-down arrow next to your name in the top right corner of the page to **log out** of the system.

Buttons

Buttons like those shown on the right allow you to start, advance, and complete tasks.



Tabs

Click tabs on a page to move between pages or page sections. The tab you are currently viewing will be underlined and bolded. Tabs not being viewed will be grayed out.



Tables

Tables allow users to sort or filter information previously entered in VAMS. You can view entry details by clicking the links in each row.

Operating hours				
3 items • Sorted by Name • Filtered by my accounts				New
Day of week ↑	Start time ↑	End time		
1 Monday	8:00 AM	12:00 PM		
2 Monday	3:00 PM	5:00 PM		
3 Tuesday	9:00 AM	4:00 PM		Edit Delete

A Note About Privacy

To receive COVID-19 vaccine, vaccine recipients must enter data that are considered personally identifiable information (PII) and protected health information (PHI). PII is any data that could potentially identify a specific individual. PHI is information, including demographic information, that relates to the individual's past, present, or future physical or mental health or condition. VAMS complies with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules. For more information about HIPAA, visit <https://www.cdc.gov/phlp/publications/topic/hipaa.html>.

Section 1

Getting Started in VAMS

This checklist provides a summary of two processes you will follow to activate your account in VAMS and learn how to view and manage appointments at your clinic.

Process	Information You Need to Complete this Process
<input type="checkbox"/> <u>Activate your user account in VAMS.</u> Follow the prompts in your registration email from vams@cdc.gov to complete this process.	<ul style="list-style-type: none">• Access to the internet• Access to your email account• Registration email from vams@cdc.gov
<input type="checkbox"/> <u>Learn to view and manage scheduled appointments.</u> Familiarize yourself with using VAMS to view upcoming appointments or to cancel them if needed.	<ul style="list-style-type: none">• N/A



Activate Your VAMS Account

What you'll need to complete this process

- Access to the internet
- Access to your email account
- Registration email from **vams@cdc.gov**

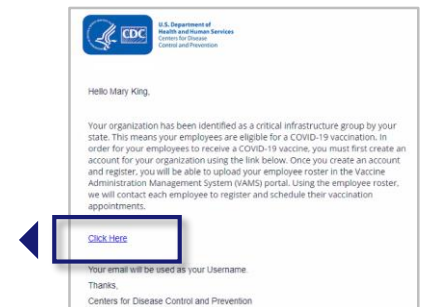
You must activate an account in VAMS to use the system. After your clinic administrator enters your name and email address in VAMS, you will receive an email with a VAMS registration link.

- Search your inbox for an email from **vams@cdc.gov**.

Quick Tip: If this email is not in your inbox, you may need to check your junk or spam mail folders. If you still cannot find the email, contact your jurisdiction's POC.

- Click the **registration link** in the email. This takes you to the account creation page in VAMS.

NOTE: The registration link in your email is for your registration only and cannot be used to register anyone else. Please do not forward it to anyone as the link will not work for them.



- **Verify your email address** (the email address where you received the original VAMS invitation will be prepopulated). Your email address will be your **user name** when logging in to VAMS.
- Create and verify your **password**.
- Check your email account for a **verification code** that will be sent to you immediately after clicking the registration link in your email from vams@cdc.gov. **Enter the verification code.**
- Read the **terms and conditions** and check the box saying you agree.
- Click **Create Account**.

NOTE: Every time you log into VAMS, you must verify your identity through a two-factor authentication process. After five log-in attempt failures, you will be locked out of the system for one hour.

After creating your account, you are immediately taken to the Clinic Portal home page, where you see a **Manage Appointments** table.



View/Manage Scheduled Appointments

As the clinic's HP, you have access to view the clinic's scheduled appointments and can cancel recipient appointments, if needed. Review the guidance below to familiarize yourself with how to view appointments and cancel them.

View Scheduled Appointments

- On the Clinic Portal home page, you will see the Manage Appointments tab.
- Clicking the **drop-down** in the Manage Appointments table header will provide you with two list views that filter recipients listed in the table by Checked-In Recipients or Today's Checked-In Appointments.
 - Today's Checked-In Appointments view will display your clinic's appointments scheduled that day and is the default view.
 - Checked-in Recipients view will display all checked-in recipients for yesterday and today.
- You also can sort appointment data in the table by scheduled appointment start time, name, DOB, gender, or email address.

Cancel Appointments

- Click **Cancel** in the Cancel Appointment column.
 - A screen with the appointment details will appear.
- Select a **cancellation reason** from the drop-down menu.

- Click **Cancel Appointment** to cancel the appointment. Click **Keep Appointment** if you no longer want to cancel the appointment.
- After clicking Cancel Appointment, a cancellation confirmation message will appear. Click **OK** and you will return to the Clinic Portal home page.

Section 2

Vaccine Administration

Below are the steps you'll follow in VAMS for logging vaccine administration.

Step	Details
<input type="checkbox"/> Step 1: Access the Recipient's Record	You will need: <ul style="list-style-type: none">• Recipient's name or email address
<input type="checkbox"/> Step 2: Review the Recipient's Record	You will review: <ul style="list-style-type: none">• Notes in the recipient's record (if applicable)• Alerts• Prevacination Questionnaire• Recipient details• Medical information• Vaccine administration
<input type="checkbox"/> Step 3: Log Vaccination	You will need: <ul style="list-style-type: none">• UoU (vaccine vial) information You will perform these steps: <ul style="list-style-type: none">• 3a. Log vaccine information• 3b. Log vaccine outcome• 3c. Log waste (if applicable)• 3d. Tell the recipient when they can get their second dose of vaccine

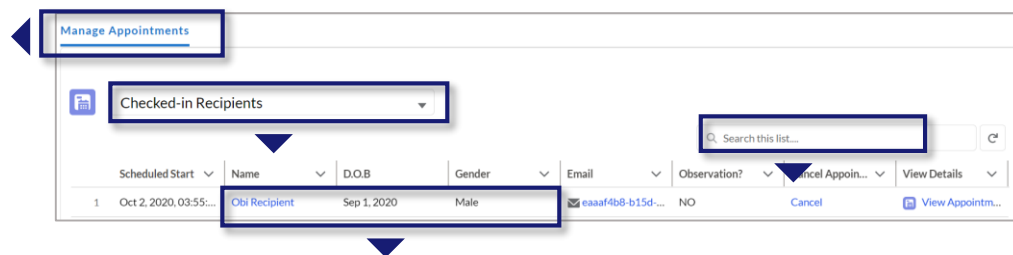
❑ Step 1: Access the Recipient's Record

You will need:

- Recipient's name or email address

The first step in vaccine administration is accessing the recipient's record. To access a recipient's record, you must locate their appointment in VAMS.

- On the Clinic Portal home page, you can search for a recipient's appointment following the process outlined on [page 8](#) and listed below.



- Clicking the **drop-down** in the Manage Appointments table header will provide you with two list views that filter recipients listed in the table by Checked-In Recipients or Today's Checked-In Appointments.
 - Today's Checked-In Appointments view will display your clinic's appointments scheduled that day.
 - Checked-in Recipients view will display all checked-in recipients for yesterday and today.
- You can also **search** by name or email address using the search bar in the table header.

- To access the recipient's record, click the **recipient's name**. The next screen that appears is a confirmation screen asking, "Have you verified this is the correct recipient?" to remind you to verify the recipient's identity.
- **Verify** the recipient's identity by confirming their name and DOB, then **select Yes or No** on the confirmation screen.
 - If you select **Yes**, you will be taken to the Recipient Record.
 - If you select **No**, you will go back to the previous page.

□ Step 2: Review the Recipient's Record

You will review:

- Notes in the recipient's record (if applicable)
- Alerts
- Prevaccination Questionnaire
- Recipient details
- Medical information
- Vaccine administration

Reviewing a recipient record is a crucial step in deciding whether to administer the vaccine.

The screenshot displays the VAMS Clinic Portal interface for a recipient's record. Key elements include:

- Header:** VAMS Clinic Portal Vaccine Administration Management System.
- Recipient Information (a):** Mr. Anto John, Gender: Male.
- Next Dose (b):** Recipient will be eligible for the next dose of the COVID-19 vaccine on or after 09/30/2020. [View vaccination certificate.](#)
- Notes (d):** Notes (0).
- Alerts (c):** Based on the vaccination recipient's reported information, please review medical information before vaccination administration.
- Navigation (e):** Prevaccination Questionnaire, Recipient Details, Medical Information, Vaccine Administration.
- New Note Button (d):** Located in the top right corner.

- a Recipient Information:** At the top of the recipient record you will find basic recipient information (e.g., name and gender).
- b Next Dose:** Next will be information about when the recipient will be eligible for their **next dose** of COVID-19 vaccine if they have already received a dose. The date listed is based on that vaccine's protocol. This is where you can also view their vaccination certificate if they have completed the vaccine series.
- c Alerts:** Below the Notes section, **alerts** will appear if the recipient has reported information about their **medical history** that is important to review prior to vaccination. If the recipient has not reported anything of note, no alert will be present.
- d Notes:** In the Notes section of the record, you can log information about the recipient that may be helpful to another HP in the future (e.g., Recipient is nervous about needles).

➤ To **log a note**, click **New Note** in the upper right corner of the page. A pop-up window will appear where you can add your note. Click **Done**.

A NOTE ABOUT NOTES:

- The name of the HP who created the note will be linked to the note.
- If a recipient has a follow-up appointment with another HP at your clinic, notes will be visible to the HP.
- If a recipient has a follow-up appointment at another clinic, notes will be visible to the HP at that clinic.
- You can delete a note you have created by clicking the drop-down arrow next to the note in this table, then clicking Delete.

❑ Step 2: Review the Recipient's Record (continued)

VAMS Clinic Portal
Vaccine Administration Management System

Recipient
Mr. Anto John

Gender
Male

Recipient will be eligible for the next dose of the COVID-19 vaccine on or after 09/30/2020. [View vaccination certificate.](#)

Notes (0)

⚠ Based on the vaccination recipient's reported information, please review medical information before vaccination administration.

✅ The Recipient has completed the Vaccine Questionnaire

Navigation Tabs: Prevaccination Questionnaire | Recipient Details | Medical Information | Vaccine Administration

- e Finally, there are the **four tabs with information** to review prior to administering a vaccine.

Prevaccination Questionnaire: Information relevant to today's appointment such as allergies, current medical treatment, patient's health status today, etc.

Recipient Details: Name, gender, mailing address, race and ethnicity, preferred method of communication, etc.

Medical Information: Current medications and health conditions, known allergies, insurance information, etc.

Vaccine Administration: Record of COVID-19 vaccination history and **Log Vaccination** button.

□ Step 3: Log Vaccination

You will need:

- UoU (vaccine vial) information

You will perform these steps:

- 3a. Log vaccine information (scan barcode or enter manually)
- 3b. Log vaccine outcome
- 3c. Log waste (if applicable)

➤ Once you have reviewed the recipient's information, click the **Vaccine Administration** tab to start the vaccination process.

➤ Click **Log Vaccination**.

Recipient: Mr. Anto John

Gender: Male

Recipient will be eligible for the next dose of the COVID-19 vaccine on or after 09/30/2020. [View vaccination certificate](#)

Notes (0)

Based on the vaccination recipient's reported information, please review medical information before vaccination administration.

The Recipient has completed the Vaccine Questionnaire

Pre-vaccination Questionnaire | Recipient Details | Medical Information | **Vaccine Administration**

Vaccines Administered (1)

1 item • Updated a few seconds ago

Date Administered	Product	Manufacturer	Dose	Lot Number	Exp. Date	Clinic
9/29/2020	COVID-19	SanoPh-Pasteur	10 mL	03H1211	1/2022	Patient First - Mechanitzburg

[View All](#)

- On the Assess Recipient Condition page, respond to both questions shown on the screen, then click **Next**.
- If you answer **No** to either question, the recipient is ineligible for vaccination at this time. You will be taken to a screen that says, "Because the vaccine was not able to be administered, a reschedule prompt has been sent to the recipient's email." **Select** a reason for the unsuccessful administration from the drop-down menu and click **Next**.

Log vaccination

Assess recipient condition | Enter vaccine info | Log vaccination outcome | Record wastage

Based on the vaccine recipient's reported information, please review Medical Information before vaccine administration.

Based on the recipient's current condition and medical history, should the COVID-19 vaccine be administered?

☐ Yes

☐ No

Has the recipient received the COVID-19 EUA Fact Sheet or VSE?

☐ Yes

☐ No

Next

3a. Log Vaccine Information

- After confirming you can administer the vaccine, you will progress to the Enter vaccine information screen, where you can **select** from two options to enter the vaccine information:
- Scan UoU barcode
 - Enter UoU information manually

Log vaccination

✓ | **Enter vaccine info** | Log vaccination outcome | Record wastage

Select method of logging vaccine information

☐ Scan UoU (vial) barcode

☐ Enter UoU (vial) information manually

[Previous](#) **Next**

First, you will learn how to enter vaccine information using a 2D barcode scanner, then how to enter it manually.

□ Step 3: Log Vaccination *(continued)*

3a. Log Vaccine Information *(continued)*

Log vaccine information with a 2D barcode scanner

- Select **"Scan UoU barcode,"** then click **Next**.

NOTE: VAMS is compatible with 2D barcode scanners (Bluetooth wireless and those that are not wireless). However, integrated mobile device scanning (i.e., an app that can scan a 2D barcode) will not connect with or automatically transfer information to VAMS.

- **Scan the barcode** and the vial information will populate in the UoU (vial barcode) field.
 - The vial information is checked against inventory that exists in the system. If the system cannot find a match for your barcode, an error message will appear, and you will be unable to continue.

- Click **Next**.

- After scanning your barcode, you will see a review screen that includes a drop-down for you to **enter the vaccine administration site** (e.g., left deltoid).
- **Confirm** the review screen is accurate, **select** the administration site, then click **Next**.

Log vaccination

Enter vaccine info

Log vaccination outcome

Record wastage

* Select method of logging vaccine information

☒ Scan UoU (vial) barcode

☐ Enter UoU (vial) information manually

Next

Log vaccination

Enter vaccine info

Log vaccination outcome

Record wastage

* UoU (vial) barcode

Next

Log vaccination

Enter vaccine info

Log vaccination outcome

Record wastage

UoU (vial) NDC 55981

Product COVID-19

Dose 0.5mL

Route Intramuscular

Manufacturer Merck

UoU (vial) lot number RHP03

Expiration date 07/15/2021

* Site

Next

❑ Step 3: Log Vaccination *(continued)*

3a. Log Vaccine Information *(continued)*

Log vaccine information manually

If you are unable to scan the 2D barcode or do not have a 2D barcode scanner, you can manually enter vaccine information.

- Select **“Enter UoU (vial) information manually,”** then click Next.
- Select the **Manufacturer** from the drop-down menu.

NOTE: Based on vaccine inventory data already logged in the system, the drop-down selections for the next two fields will be dependent upon the manufacturer you selected.

- Select a **Product** from the drop-down menu.
- Select a **UoU (vial) lot number**.
- The expiration date will prepopulate and cannot be edited.
- Click **Next**.

The screenshot shows the 'Log vaccination' form with the 'Enter vaccine info' step active. The form contains the following fields:

- Manufacturer:** A dropdown menu.
- Product:** A dropdown menu.
- UoU (vial) lot number:** A text input field.
- Expiration date:** A prepopulated date field in mm/yyyy format.

 A blue box highlights the 'Next' button at the bottom right.

- The next screen provides a summary of the vaccine information entered for your review and a field to select **the vaccine administration site** (e.g., left deltoid) from the drop-down menu.
- Select the administration site, then click **Next**.

The screenshot shows the 'Log Vaccination' summary screen. It displays a list of entered information:

- UoU (vial) NDC:** 4615171616
- Product:** COVID-19
- Dose:** 0.5mL
- Route:** IM
- Manufacturer:** Merck
- UoU (vial) lot number:** 1234567
- Expiration date:** 2025-11-30

 Below this list is a dropdown menu for the administration site, with 'Left Deltoid' selected. A blue box highlights the 'Next' button at the bottom right.

□ Step 3: Log Vaccination *(continued)*

3b. Log Vaccination Outcome

Indicate if the vaccine administration was successful.

- If the administration was successful, click **Yes**, then click **Next**.

- If the vaccine administration was unsuccessful, select **No** and click **Next**.
 - The system will ask you questions to determine if it is possible to re-attempt vaccination.

- If it is **possible to re-attempt** vaccination, you will be directed back to the **Log Vaccination** page, where you can enter the vaccine information manually or by scanning the barcode.
- If it is **not possible to re-attempt** vaccination, the system will ask you if wastage occurred. If wastage occurred, then select **Yes** and log waste. If wastage did not occur, select **No** and click **Next**.

- ❖ Upon selecting next, the system will prompt you to record a reason for unsuccessful vaccination. Select a reason from the drop-down and click **Next**. Once you log the vaccination as unsuccessful, the recipient **receives an email** from vams@cdc.gov prompting them to schedule a new appointment.

□ Step 3: Log Vaccination *(continued)*

3b. Log Vaccination Outcome *(continued)*

Indicate if wastage occurred.

- If no wastage occurred, click **No**, then click **Next**.

3c. Log Waste

- If wastage occurred, click **Yes** and log the waste. You can log vaccine wastage information by following the same process you follow to log vaccine information—either manually or by scanning the vial barcode.

3d. Tell the Recipient When They Can Get Their Second Dose of Vaccine

- After clicking **Next** on the final screen, a new window appears notifying you when the recipient is eligible to receive their next dose of COVID-19 vaccine, if required for the vaccine product received.
- The vaccine data entered in the system determine the date the recipient is eligible to receive their next dose and will not allow the recipient to book an appointment before that date.
- VAMS **sends a notification** to the recipient that includes the date they are eligible to receive their next dose along with a link to schedule their next appointment on or after that date.
- Inform the recipient they can access their vaccination certificate from the Recipient Portal. You can also **view the vaccination certificate** by clicking the hyperlinked text on the confirmation page (see screenshot) or by accessing the recipient record.
- If no further doses are required, the pop-up window states all COVID-19 vaccine doses have been administered.

Section 3

Vaccine Administration in Third-Party Clinics

This section is for healthcare professionals working at third-party clinics. A **third-party clinic** may be held in a facility such as a long-term care facility (LTCF), nursing home, correctional facility, or other setting where recipients cannot activate an account or record their medical history in VAMS. This section explains the differences between standard and third-party clinics, how to add recipients from third-party clinics in VAMS, and how to log vaccine administration.

Use VAMS for COVID-19 Vaccine Administration in Third-Party Clinics

Third-Party Clinic Administration

Understand the differences between third-party clinics and standard clinics.

Add Recipients One at a Time

Enter information about recipients one at a time to make them eligible to receive COVID-19 vaccination.

Bulk Upload Recipients

Enter information about multiple recipients via bulk upload to make them eligible to receive COVID-19 vaccination.

COVID-19 Vaccine Administration

Record a recipient's Pre vaccination Questionnaire and track when they are eligible for the next dose of COVID-19 vaccine.



Third-Party Clinic Administration

A third-party clinic is a clinic established in an existing facility such as a LTCF, nursing home, correctional facility, or other setting to facilitate the administration of COVID-19 vaccine to recipients who reside in or are served by those facilities. As the healthcare professional, you or the clinic administrator will serve as the third party for vaccine recipients who cannot activate an account or record their medical history in VAMS.

Key differences between a standard clinic and a third-party clinic:

- A third-party clinic will only require two types of VAMS users to be registered in the system: clinic administrator and healthcare professional.
- Recipients will not activate their own account or record their medical history in VAMS, so a recipient's record will need to be added in the system for them by either the **third-party clinic's administrator** or **healthcare professional**.

As a healthcare professional at a third-party clinic, some of your activities in VAMS will be slightly different than those outlined previously in this user manual.

Since recipients will not have appointments, you can disregard [View and Manage Scheduled Appointments](#). To administer COVID-19 vaccine to recipients, you will follow the same process outlined in [Section 2: Vaccine Administration](#) but you can also add recipients in VAMS, record prevaccination actions, and track when recipients are eligible for their next dose. These activities are highlighted in the activity matrix below. The third-party clinic's administrator can also add recipients in VAMS.

Activity in VAMS	Standard Clinic Healthcare Professional	Third-Party Clinic Healthcare Professional	Standard Clinic Administrator	Third-Party Clinic Administrator
Serve as clinic point of contact for your jurisdiction			✓	✓
Manage clinic information (e.g., physical address)			✓	✓
Set and manage clinic schedule			✓	N/A
Manage (add, edit, remove) VAMS users			✓	✓
Place inventory requests			✓	✓
Log vaccine inventory when received			✓	✓
Log vaccine waste			✓	✓
Add recipient information and insurance information (if applicable), and record Prevaccination Questionnaire in VAMS		✓		✓
Access and review recipient record (name, date of birth [DOB], medical history, known allergies, etc.); add notes to record	✓	✓		
Log vaccination (vaccine information, outcome, and waste if applicable)	✓	✓		
View dates when recipient can get the second dose of vaccine	✓	✓		
Track dates when recipient can get the second dose of vaccine		✓		



Third-Party Clinic: Add Recipients One at a Time

Add Third-Party Clinic Vaccine Recipients in VAMS

Since vaccine recipients will not be creating their own account and entering their medical history in VAMS, they will need to be added in VAMS by you as the **healthcare professional** or by the **third-party clinic's administrator**.

You will need the following information about the recipient to add them in VAMS:

- First and last name
- Gender
- Ethnicity and race
- Whether the prevaccination actions have been completed. Prevaccination actions include screening the recipient for contraindications, providing the Emergency Use Authorization (EUA) Fact Sheet or a Vaccine Information Statement (VIS) depending on the vaccine product(s) available to the recipient, and acquiring authorization, if required. If the prevaccination actions have not been completed, you or the clinic administrator can edit this response at any time after the recipient has been added in VAMS.
- Insurance information (if applicable)
- Medications (if applicable)
- Other relevant medical information (if applicable)

There are two ways to add recipients in VAMS—one at a time or bulk upload. First, you will review how to add one recipient at a time, then how to bulk upload multiple recipients.

Add Third-Party Clinic Recipients One at a Time

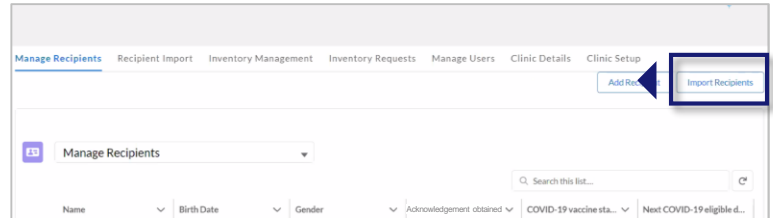
- Click the **Add Recipient** on the **Manage Recipients** page, which is also your third-party clinic's home page in VAMS.
- Enter the **recipient's information**. The recipient's home address will default to the third-party clinic's address in VAMS. Click **Next**.
- Enter the **recipient's insurance information** (if applicable). Click **Next**.
- **Review** all information entered on the Add Recipient pages and **verify** everything is correct. If so, click **Next**. If not, click **Previous** to make corrections.
- After clicking **Next**, the recipient's record is saved in VAMS.



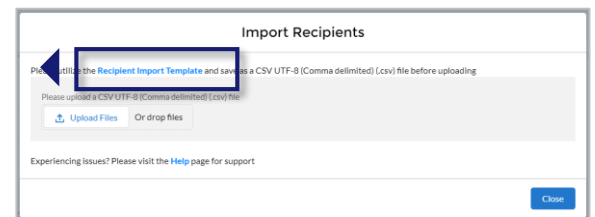
Third-Party Clinic: Bulk Upload Recipients

Bulk uploading allows you to add multiple recipients at once by adding their information in a comma delimited (.csv) template and uploading it in VAMS.

- Click **Import Recipients** from the **Manage Recipients** page.

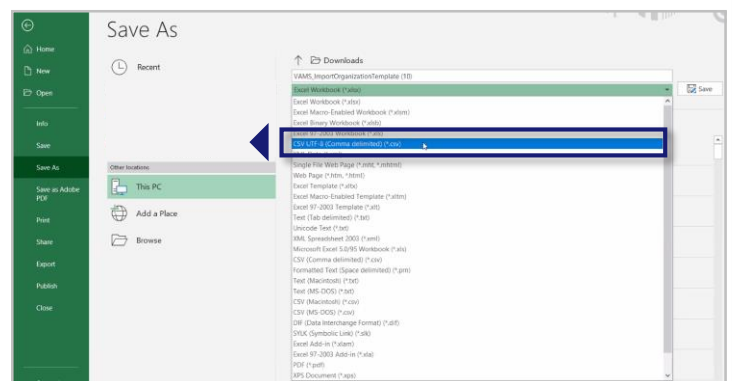


- Click the **Recipient Import Template** link in the pop-up window that appears. After clicking the link, the template file will download to your computer.



Important Notes About the Recipient Import Template File:

- The file opens on your computer as an .xlsx file, but you **must** save it as a "CSV UTF-8" (comma delimited or .csv) file **after** entering all information and **before** uploading it to VAMS. No other types of csv files are accepted.
- You **must** use this template when uploading a list of recipients in VAMS.
- All fields marked with an asterisk are required.
- Fields that contain a pick list or drop-down options **must** contain a selection.
- VAMS will not upload a recipient if any of the required fields are blank.
- The recipient's DOB must be in MM/DD/YYYY format.
- VAMS will not upload **duplicates** if someone is listed in the csv file multiple times or if they have already been added in VAMS.
- There is a file size limit of 25 MB.
- You are limited to uploading a maximum of 9,999 recipients at one time. If the file contains 10,000 or more recipients, the following error message will appear: "The file uploaded has more than 9,999 records which exceeds the limit of the Import Functionality. Please try again."



Quick Tip: A comma-separated values (CSV) file is a delimited text file that uses a comma to separate values. A CSV file stores tabular data (numbers and text) in plain text.

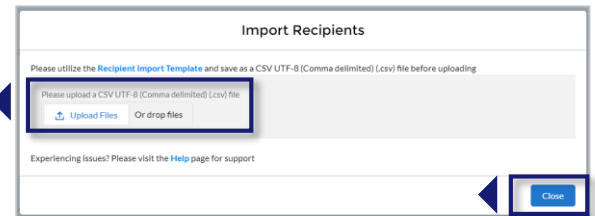


Third-Party Clinic: Bulk Upload Recipients

(continued)

- Open the file and enter the **recipients' information**.
- Save the file as a **CSV UTF-8 (Comma delimited) (.csv)** file. You can find this option under the "Save As" drop-down menu in Excel.

- Click **Upload Files** in the Import Recipients pop-up window. You can also drag and drop your organization list in the "Drop Files" area of the page.



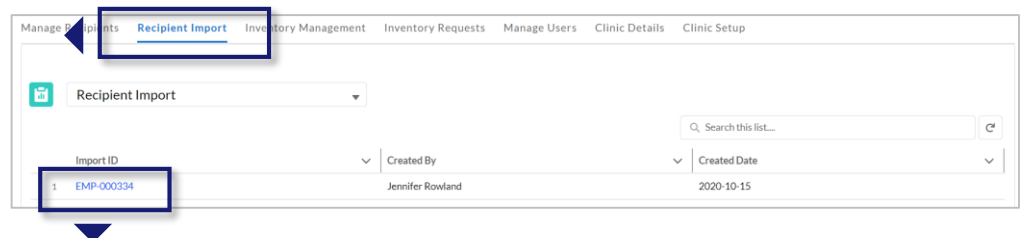
- Click **Close**.

Confirm Bulk Upload

After importing a list of recipients, the following processes automatically occur in VAMS:

- A message will appear on screen that your list is in the import queue.
- After your list has processed, you will receive an email from vams@cdc.gov, stating it is uploaded.
- A result log will appear on the Recipient Import page.

- Click the **Recipient Import** tab to check the results of your bulk upload.



On the **Recipient Import** page, you will see information about your upload, including the system-generated Import ID number, who imported the list, and when it was imported.

- Click the **Import ID** number of the recipient import to open the import details page.



Third-Party Clinic: Bulk Upload Recipients (continued)

Confirm Bulk Upload (continued)

There are two main sections on the Import Details page:

- **Import details**, which include the import ID, jurisdiction name, created by, and created date.
- **Notes and Attachments** table, which includes two files: a Result Log for Bulk Upload file and the recipient import file you uploaded.

Recipient Import			
Import ID	EMP-000334		
Created By	Jennifer Rowland		
Created Date	10/15/2020		
Notes & Attachments (2)			
Title	Type	Owner	Last Modified
ResultLog for BulkUpload Thu, 15 Oct 2020 8:27 PM.csv	Attachment	Jennifer Rowland	10/15/2020, 8:27 PM
Uploaded File: Thu, 15 Oct 2020 8:27 PM.csv	Attachment	Jennifer Rowland	10/15/2020, 8:27 PM

- The Result Log for Bulk Upload file shows the results of your file upload.

➤ Click the **Result Log for Bulk Upload** link to open the file.

➤ Scroll to the right until you see the **status column**. The **status column** shows whether a recipient was added in the system.

- If there were duplicates or missing information in the csv file, you will see an **error message** telling you why a recipient was not uploaded.
- All recipients who have a status of **Success** have been uploaded in the system. Recipients whose statuses include an error message were not uploaded in the system.

	A	B	C	D	E	F	G	H	I
1	FirstName	LastName	Email	Status					
2				Insert failed due to blank values. All Fields Are Required					
3	Random	User	ruser@ma	email already exists in the system					
4	FNU	LNU	Inufnu@	email already exists in the system					
5									
6									
7									



Third-Party Clinic: COVID-19 Vaccine Administration

To administer COVID-19 vaccine to recipients, you will follow the same process outlined in [Section 2: Vaccine Administration](#) with two additional activities: **recording that the recipient's prevaccination actions are completed**, if they haven't been completed yet, and **tracking when recipients are eligible to receive their next dose**.

Record Recipient Prevaccination Actions are Complete

- After accessing the recipient record from the Manage Recipients page, you will see an alert that indicates whether a recipient's prevaccination actions are complete.
- To update this response to indicate their prevaccination actions are complete, click **Edit Recipient Details** in the Recipient Details tab.
- Select a response** from the drop-down menu. Click **Next** on that page, the Insurance page, and the Review page.

Track Dates When Recipients Can Get Second Dose of Vaccine

- The Manage Recipients page contains a list of the recipients who have been added in VAMS. This list includes key information that will help you keep track of **how many doses** each recipient has received as well as the **date they are eligible to receive their next dose**.

Manage recipients

Manage recipients

Search residents

Import recipients

Add recipient

Name	DOB	Gender	Prevaccination actions complete	Influenza vaccine status	COVID-19 vaccine status	Next COVID -19 eligible date
Adrian Quinteros	12/17/1923	Female	No	0/1 received	1/3 received	10/20/2020
Hannah Ney	07/06/1934	Female	Yes	0/1 received	0/3 received	10/25/2020
Jeremy Mills	09/26/1926	Female	Not applicable	0/1 received	2/3 received	10/21/2020
Beulah Hart	06/15/1936	Female	Yes	0/1 received	1/3 received	10/20/2020
Tom Manning	11/16/1924	Female	No	Completed	Completed	n/a

Section 4

Additional VAMS Functionality

This section will show you how to perform other infrequent activities in VAMS, such as registering as a COVID-19 vaccine recipient, or actions that will only apply to certain users, such as those who work at multiple clinics.

Additional VAMS Functionality

Register as a COVID-19
Vaccine Recipient

Learn how to become eligible to receive COVID-19 vaccination.

Access Multiple Clinics in
VAMS

Access different clinics in VAMS if you work at multiple vaccination clinics.

Access Support

Know how to find answers to frequently asked questions (FAQs) about VAMS.



Register as a COVID-19 Vaccine Recipient

Register as a COVID-19 Vaccine Recipient in VAMS

Before you can register as a COVID-19 vaccine recipient, your clinic administrator must register your clinic as an organization in VAMS and then add you as an employee of the organization.

After your clinic administrator registers your clinic as an organization and adds you as an employee in VAMS, a registration email will be sent to you from vams@cdc.gov with a link to register as a COVID-19 vaccine recipient.

- If you're logged into VAMS, first **log out** by clicking the drop-down arrow next to your name in the upper right corner, then click **Logout**.
- Open your recipient registration **email notification** and click the link to register your account.

- On the next screen, enter the **email address** you use for your clinic user log-in.
- Enter the **same password** you use when logging in as a clinic user. Complete the **reCAPTCHA**, then click **Login**.

NOTE: You must use the same email address and password to log into VAMS for every user role you hold.

After logging in, you will be taken to the **Portal Selection** screen, where you will have multiple portals to choose from, including the Clinic Portal and Recipient Portal. **You are now officially a VAMS multi-portal user!**

- Click **Access Portal** below the Recipient Portal to complete your recipient registration.

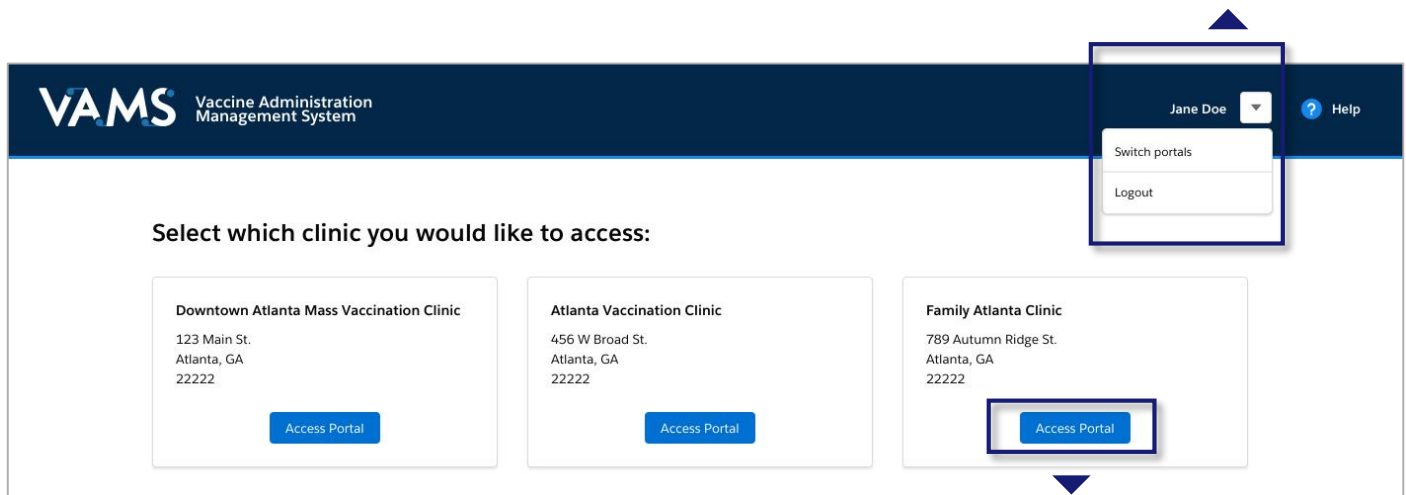
Quick Tip: While logged into VAMS, you can switch portals by clicking the drop-down arrow next to your name in the upper right corner and selecting **Switch Portals**.



Access Multiple Clinics in VAMS

You may need to perform the same or different user roles at multiple clinics. After the clinic administrator at each clinic adds you as a user for their clinic, you can easily access multiple clinics after logging into VAMS.

- From any page in VAMS, click the **drop-down arrow** next to your name in the upper right corner to access the drop-down menu.
- Click **Switch Portals**.
 - If you have multi-portal access (i.e., you have access to more than one portal—Clinic Portal and Recipient Portal, for example) this will take you to the **portal selection page**. Click the **Clinic Portal** button, then you will see the **clinic selection page** shown below.
 - If you only have multi-clinic access (i.e., you have a clinic role at more than one clinic but do not have access to another portal) clicking **Switch Portals** will take you straight to the **clinic selection page**.



- From the **clinic selection page**, choose which clinic you want to switch to by clicking the **Access Portal** button under the clinic name.



Access Support

Where to Find Additional VAMS Resources and Information

Help Page

If you need help when using VAMS, click the Help link in the top right corner of the navigation bar to search for answers to FAQs.

You can read through the list of FAQs or you can search for a particular topic in the search bar located below the FAQs tab.

The screenshot displays the VAMS Clinic Portal interface. At the top left is the VAMS logo and the text "Clinic Portal Vaccine Administration Management System". At the top right, it shows the user "John Administrator" with a dropdown arrow and a "Help" link with a question mark icon. Below the header, there is a "Clinic FAQ" tab. Underneath the tab is a search bar with the placeholder text "Search" and a magnifying glass icon. Below the search bar, a knowledge article titled "How do I make an inventory request?" is visible, with a subtext "Contains steps for Clinic staff to make inventory requests" and metadata "12 Views · Jul 23, 2020 · Knowledge".

Glossary of Terms

Term	Definition
2D Barcode	A two-dimensional barcode that stores information vertically and horizontally. It may contain the vaccine product identification information, lot number, and expiration date.
.csv	A comma-separated values (CSV) file is a delimited text file that uses a comma to separate values.
Emergency Use Authorization (EUA) Fact Sheet	A document produced by the vaccine manufacturer that informs vaccine recipients or their parents or legal representatives about the benefits and risks of a vaccine they are receiving.
Employee	Any worker, staff member, volunteer, or other personnel being added in VAMS to receive COVID-19 vaccination.
Employer	One type of organization.
Multi-Clinic User	A clinic user who performs the same or different roles at multiple clinics registered in VAMS. This user can switch between clinic accounts within the Clinic Portal.
Multi-Portal User	A VAMS user with access to multiple VAMS portals (e.g., a clinic administrator who is also registered as a VAMS recipient can access the Clinic Portal and Recipient Portal).
Organization	Any institution, association, company, or other group that will add their essential workers in VAMS.
Prevaccination Questionnaire	Questionnaire recipients must complete prior to receiving vaccine. Healthcare professionals will review this information to ensure there are no contraindications or precautions present before administering vaccine.
Third-Party Clinic	Vaccination clinic established at a facility such as a long-term care facility (LTCF) or correctional facility where the facility will manage COVID-19 vaccine administration for facility residents.
Unit of Use (UoU)	The vaccine vial.
Vaccine Information Statement (VIS)	A document that informs vaccine recipients or their parents or legal representatives about the benefits and risks of a vaccine they are receiving.
Vaccination Clinic	A clinic administering COVID-19 vaccine. Sometimes referred to as a “vaccine clinic” in VAMS and this user manual.
Vaccination Series	A series of vaccinations, including the timing of all doses, which may be either recommended or compulsory (e.g., there are two vaccine doses that must be administered with an appropriate time interval between them for a COVID-19 vaccination series to be complete).